APPENDIX - A

Contents

Glossary

A	N
B	O
C	P
D	Q
E	R
F	S
G	T
H	U
I	V
J	W
K	X
L	Y
M	Z

Add Data by Importing

If you have sales data in a file or another sales tool, you may want to import that data in a batch rather than manually enter it into Sales Tracker. Go to Importing Your Contact Data for more information.

Add New Contact

CLICK ON...	TO VIEW...	THEN...
My Database > Add New Contact Contacts > Add New Contact	The Add New Contact screen which is a blank form.	1. Complete the fields on the top half of the screen. 2. Add notes, action items, or products on the bottom half of the screen. 3. Click on the go button to submit the data.

Data Entry

The user types contact personal data in the fields on the left side of the screen. Fields which require a data entry are marked with an asterisk (*). All other fields are optional.

The fields on the right side of the screen concern Deal Status and information about the business. A pop-up window displays when you select a Deal Status which requires you to update other fields.

You can also add notes, action items, and products to your contact data. Just select these items on the navigation bar, and the add window will display on the bottom half of the Contacts screen.

Go Back To HELP Index

Deal Status

Deal Status is not a required field, but to take advantage of the main sales tracking features of the software you must update the Deal Status field. The initial Deal Status is "New Lead". The status is changed by selecting from the pulldown menu. Deal Status can also be changed from the My Database screen or by using the Deal Status Process Map.

The Deal Status selections are:

"New Lead"	Initial status
"Attempt Contact"	
"Qualified Lead"	pop-up = Probability of Sale
"Not Qualified"	
"Proposal Sent"	pop-up = Probability of Sale, Deal Amount, & Expected Close Date
"Proposal Accepted"	pop-up = Probability of Sale, Deal Amount, & Expected Close Date
"Contract Pending"	pop-up = Probability of Sale; Deal Amount, & Expected Close Date
"Closed Sale"	pop-up = Dollar Amount of Sale, Actual Close Date
"Loss"	pulldown menu = No Response, Proposal Rejected, Terms Rejected By Buyer, Terms Rejected By Seller, Credit Not Approved

For more information on Deal Status, go to Using the Deal Status Process Map.

Go Back To HELP Index

Making Additions and Changes

Change Contact Data

CLICK ON...	TO...	THEN...
Any contact name on the Home Page or My Database page	View the Contacts screen for the contact name selected	1. Make your changes 2. Click on the go button
Contacts	View the Contacts screen	1. Select the contact from the pulldown menu 2. Make your changes 3. Click on the Contacts go button

Add or Change Notes

Whenever you change contact data, you can also add or change notes.

CLICK ON...	TO...	THEN...
Contacts > Add Notes	View the Add Notes window at the bottom of the Contacts screen.	1. Select the contact from the pulldown menu 2. Add or edit notes in the Notes window 3. Click on the go button in the Notes window

The current date and time will display automatically, but you can change these items.

Go Back To HELP Index

Add Action Items

CLICK ON...	TO...	THEN...
Contacts > Add Action Items	View the Add Action Items window at the bottom of the Contacts screen.	1. Select the contact from the pulldown menu 2. Select an Action Item from the Action Item pulldown menu 3. Fill in the Requested Date if it applies 4. Select a Priority from the pulldown menu 5. Click on the go button in the Notes window

The "Action Item #" displays automatically.

When you click on the "Completed" box, today's date is entered unless you change it.

Add or Delete Products - Sales Level

CLICK ON...	TO...	THEN...
Contacts > Add Products	View the Add Products window at the bottom of the Contacts screen.	1. Select the contact from the pulldown menu 2. Select a Product from the Product pulldown menu 3. Select a Model type if it applies 4. If you are deleting the selected product from this contact's data, then click on the Delete box 5. Click on the go button in the Products window

Sales level users can select products from the pulldown menu to be added to or deleted from the data for a specific contact. They cannot add products to the list in the pulldown menu. This is a management level function.

Go Back To HELP Index

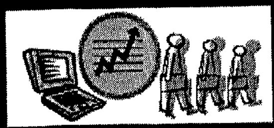
Add or Delete Products - Management Level

CLICK ON...	TO...	THEN...
Management > Update Product Table	View the Add/Update Product Table screen.	Follow the instruction on this screen to add or update the list of products to be viewed by all sales levels

Add, Update, Delete Users

This is a Management function only.

CLICK ON...	TO...	THEN...
Management > Update Users	View the Users screen.	• To Add a User - select "Add User" from the pulldown menu, complete the fields, and click on the go button • To Update a User - select the user's name from the pulldown menu, change the information, and click on the go button • To Delete a User - select the user's name from the pulldown menu, click on the Deactivate box, and click on the go button



Navigation Bar

The Sales Tracker navigation bar is visible at the top of each page. Use it to easily move from one screen to another.

Main selections on top

Current selection is highlighted

Sub-selections on bottom

- Click on a main selection to display sub-selections. NOTE: Not all main selections have sub-selections.
- Click on a sub-selection to display a new page or partial page dealing with the selected topic.
- Click on the ? on the navigation bar to open the Help Index in a separate window.

Table Selections

Some screens display your data in table format. Clicking on certain items in the tables will open a window where you can view and edit the data for the items selected.

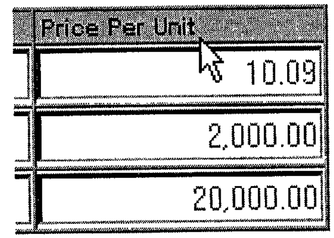
CLICK ON...	IN TABLE...	TO DISPLAY THE CONTACTS SCREEN PLUS...
an action item	My Action Items (Homepage)	Add Action Items window
a contact name	My Top Prospects (Homepage)	View Notes window
a contact name	View Database	View Notes window
an item #	View Action Items	Add Action Items window

Go Back To HELP Index

Sort Columns

Click on any table column heading to sort the data in that column. Sorting order is based on the type of data in the column. For example, text and numbers are sorted alphanumerically while dates are sorted oldest to most recent.

click on heading to sort



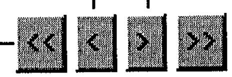
Directional Buttons

Arrow buttons display at the bottom of a table if the data does not fit on your screen. Click on the arrow buttons to scroll through the table and view all of your data.

scroll up one screen

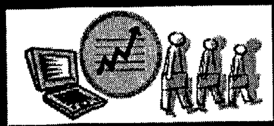
scroll down one screen

scroll to beginning



scroll to end

Go Back To HELP Index



Importing Your Contact Data

About Importing Your Contact Data

Use the My Database > Import Contact Data function to easily import your sales data from existing electronic files into Sales Tracker.

Whether you have sales contact data in a spreadsheet, a word processing file, a text file, or in the database of another sales tool, you can upload the data by saving it in a text file using a column delimiter.

For example:

- as a Text Only file (.txt) with a comma, semicolon, space or tab as the column delimiter;

- or, as a Comma Separated Value file (.csv) which automatically places a comma as the column delimiter.

Importing from a Spreadsheet

If your data is in a spreadsheet format, you should be able to save the file as either a Comma Separated Value (.csv) file or as a delimited Text (.txt) file.

Importing from a Word Processing File

Most word processing programs let you save your files in Text format. The process may differ between programs but should be self-explanatory. No matter what program you use, your data should be in either column or table format. NOTE: Do not save your file in Rich Text Format (.rtf).

Go Back To HELP Index

Importing Your Contact Data

In some word processors, such as Microsoft Word, you should convert your tables to text before you save the file. To do this, select the entire table and in the Table menu click on 'Convert Table to Text...' When you are asked to select a text separator, chose either the *comma* or the *tab*.

Importing from another Sales Tool

This should not be a problem as most sales tools have an 'export data' feature. See, Exporting Your Contact Data to learn about the exporting data feature in Sales Tracker.

Using the Import Feature

Once your data is in a Text or CSV file format, follow these steps to import the data.

1. Enter the location of your data file (full path), or click the Browse button to locate and select the file.

   Specify file name : C:\Mydata\Contacts.csv Browse...

2. Click the View button to view a sample of your data file.
   - Make sure your text is in the correct format for importing. Text should be in rows with column data separated by a delimiter (comma, semicolon, space, or tab).
   - If you do not see a character or space separating your column data, or if unusual characters are displayed, you should try converting your file again.
   - Make sure when you convert your data file that you save it as a TEXT ONLY file or a CSV (Comma Separated Value) file. Do not save it in RTF (Rich Text Format) as this will save some formatting commands which will cause those unusual characters to display.

Go Back To HELP Index

Importing Your Contact Data

For Example:

Here is a sample table of contact data as it would appear in a word processing file.

Contact Name	Business Name	Address	City	State	Zip	Phone
B.Quik	Qwik Printing	123 Paper Chase	Reading	PA	19601	484-767-7870
I.M.Hungry	Deli Delivery	45 Market St.	Center Sandwich	NH	03227	603-336-8765
A.Peach	Fruit-To-Go	67 Lemon St.	Grapeland	TX	75844	409-449-9999
Pep R. Roni	Rolling In Dough	89 Crusty Lane	Naples	NY	14512	716-999-1212
U.R.Going	Heavenly Travel	10 Gold Star Hwy.	Mystic	CT	06355	860-561-2334

Here is the same table previewed in Sales Tracker after it was saved as a CSV file.

To view the sample data press **View**

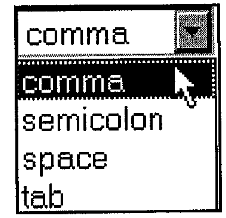
Contact Name, Business Name, Address, City, State, Zip
B. Qwik, Qwik Printing, 123 Paper Chase, Reading, PA, 19601
I.M.Hungry, Deli Delivery, 45 Market St., Sandwich, NH, 03227
A. Fruit, Fruit-To-Go, 67 Lemon St., Grapeland, TX, 75844
Pep R. Roni, Rolling In Dough, 89 Crusty Lane, Naples, NY, 14512
U.R.Going, Heavenly Travel, 10 Gold Star Hwy, Mystic, CT, 06355

Go Back To HELP Index

Importing Your Contact Data

Importing Your Contact Data

3. Select the column delimiter that was used to separate your data.



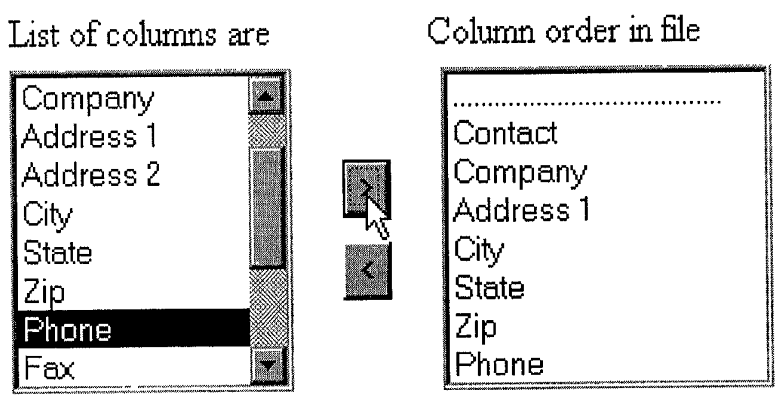
4. Click on the check box if your data contains column headings. This tells Sales Tracker that your first row is not data.

Check here if file contains header row ☑

5. In the 'List of Columns' box click on an item that best describes the first column of data in your file, then click on the arrow button to place that item in the 'Column Order' box. Continue this process for each column of data in your file.

   This process matches the columns in your file with the columns viewed in Sales Tracker. The software can now import your data to display correctly in Sales Tracker.

   Here is the column order for our sample table shown in step 2.



6. Make sure your entries are correct, then click the Import button to upload your file.

Go Back To HELP Index

Viewing Your Data

Viewing Your Data

Priorities

Database

Contacts

Reports

This table describes the various ways you can view your data in Sales Tracker:

CLICK ON...	TO VIEW...
Home	Priority items - your top five Action Items and top five Prospects
My Database > View Database	ALL of your current data in table format. To view your archived data in the table, click on the check box above the table.: ☑ **Click here to Display Archived Records**
My Database > Query Contact Database	A data entry screen allowing you to search the database for specific information. Make your entries and click on the GO button to display the View Database table. The table will contain ONLY the data you requested in your search.
My Database > View Product Table	A table of all products entered in the database. Maintaining the master product table is a management function.
Contacts > View Notes	The View Notes window at the bottom of the Contacts screen. View all notes associated with the displayed contact.
Contacts > View Action Items	The View Action Items window at the bottom of the Contacts screen. View all action items associated with the displayed contact.
Contacts > View Products	The View Products window at the bottom of the Contacts screen. View all products associated with the displayed contact.

Go back to HELP Index

Viewing Your Data

Viewing Your Data

- Priorities
- Database
- Contacts
- Reports

CLICK ON...	TO VIEW...
Contacts > View Deal History	The View Deal History window at the bottom of the Contacts screen. View the Deal Status history associated with the displayed contact.
Action Items	ALL of your current Action Items for ALL Contacts This data is in table format.
Reporting > Contacts	A data entry screen allowing you to select and sort specific Contact information to display in a report. Make your entries and click on the GO button to display the Contacts Report. The report will contain ONLY the data you requested.
Reporting > Action Items	A data entry screen allowing you to select and sort specific Action Items to display in a report. Make your entries and click on the GO button to display the Action Items Report. The report will contain ONLY the data you requested.
Reporting > Activity Daily Weekly Monthly	A selection screen allowing you to select a reporting period to display sales activity for each step in the Deal Status process. Make your selections and click on the GO button to display the Activity Report. The report will contain the Deal Status summaries for the period you requested.
Reporting > Sales Funnel	A graphical report of the sales cycle (or funnel) as it relates to the Deal Status process for all contacts. This report is a visual representation of the number of your contacts currently associated with each Deal Status step.

Go Back To HELP Index

Viewing Your Data

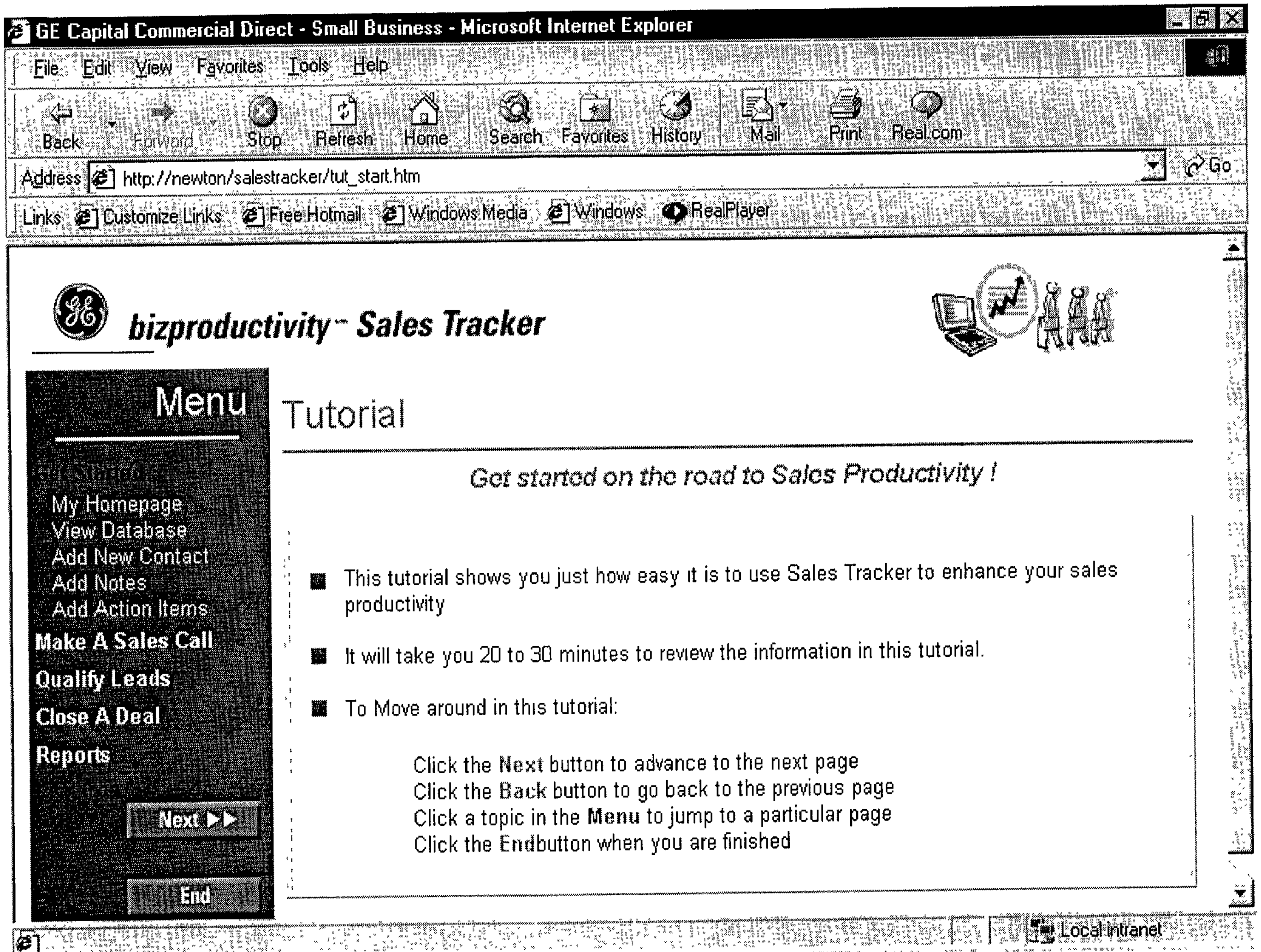
Viewing Your Data

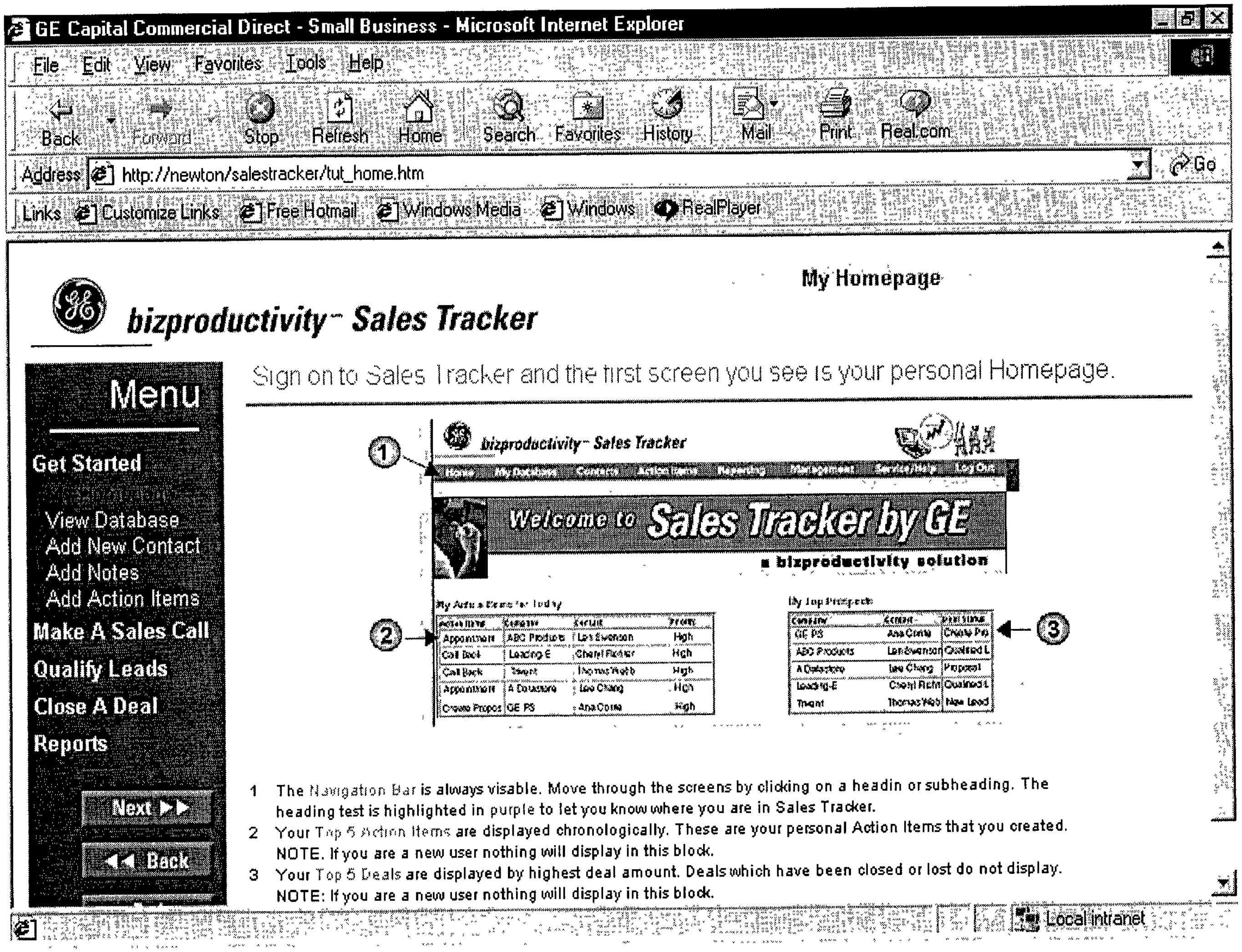
- Priorities
- Database
- Contacts
- Reports

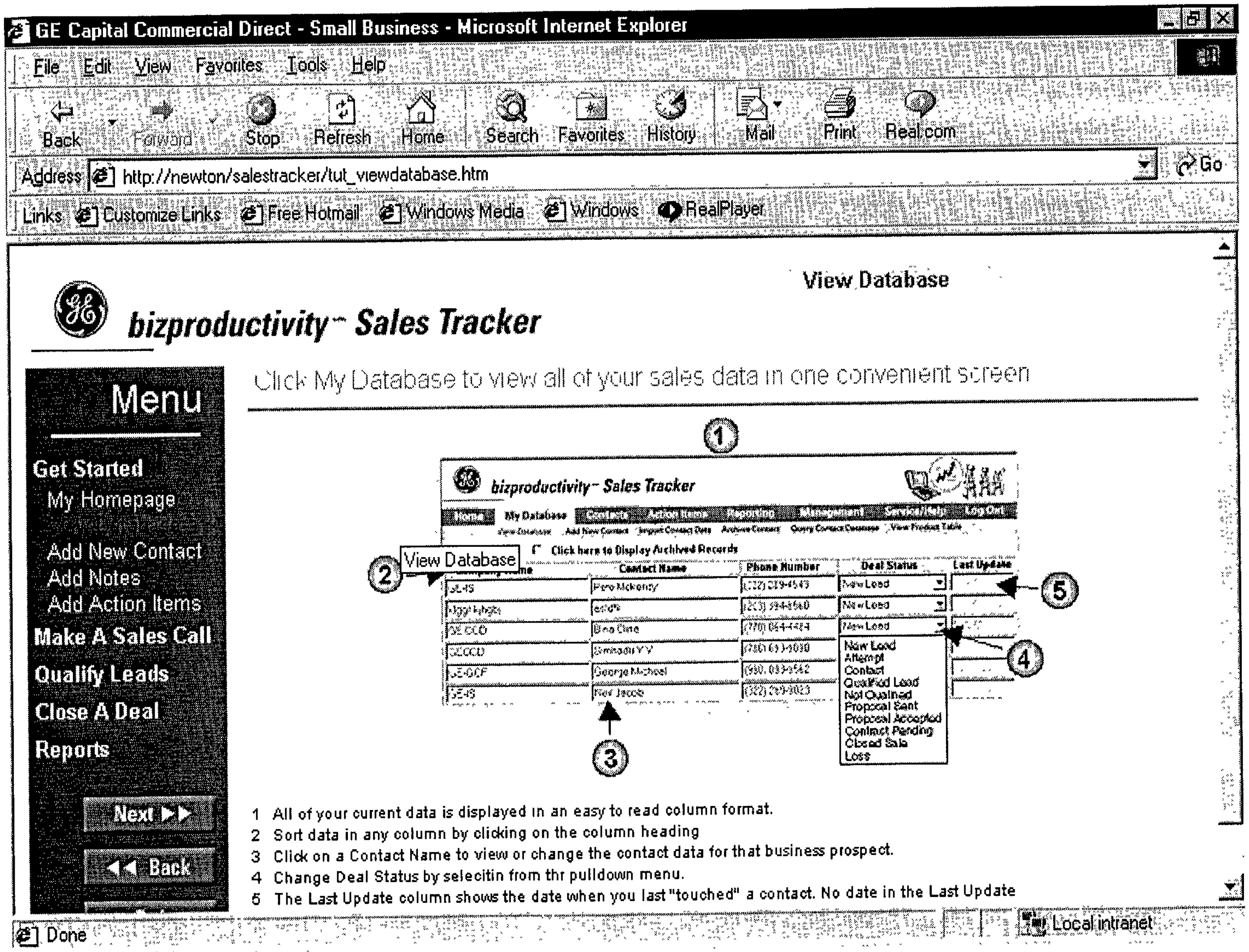
CLICK ON...	TO VIEW...
Reporting > Sales Forecast	A selection screen allowing you to select a reporting period to display sales forecasts for each of your contacts. Make your selections and click on the GO button to display the Sales Forecast Report. The report will show the sales forecast for each contact based on Deal Amount and Expected Close Date.
Reporting > Won & Lost Deals	A data entry screen allowing you to enter a date range for displaying all of your contacts with a Deal Status of Sale Closed or Loss. Make your date entries and click on the GO button to display the Won & Lost Deals Report. The report will display two tables: the Won Deals table and the Lost Deals table.
Reporting > Products	A report of all products entered in the database master product table. This report contains the same data available from My Database > View Product Table.

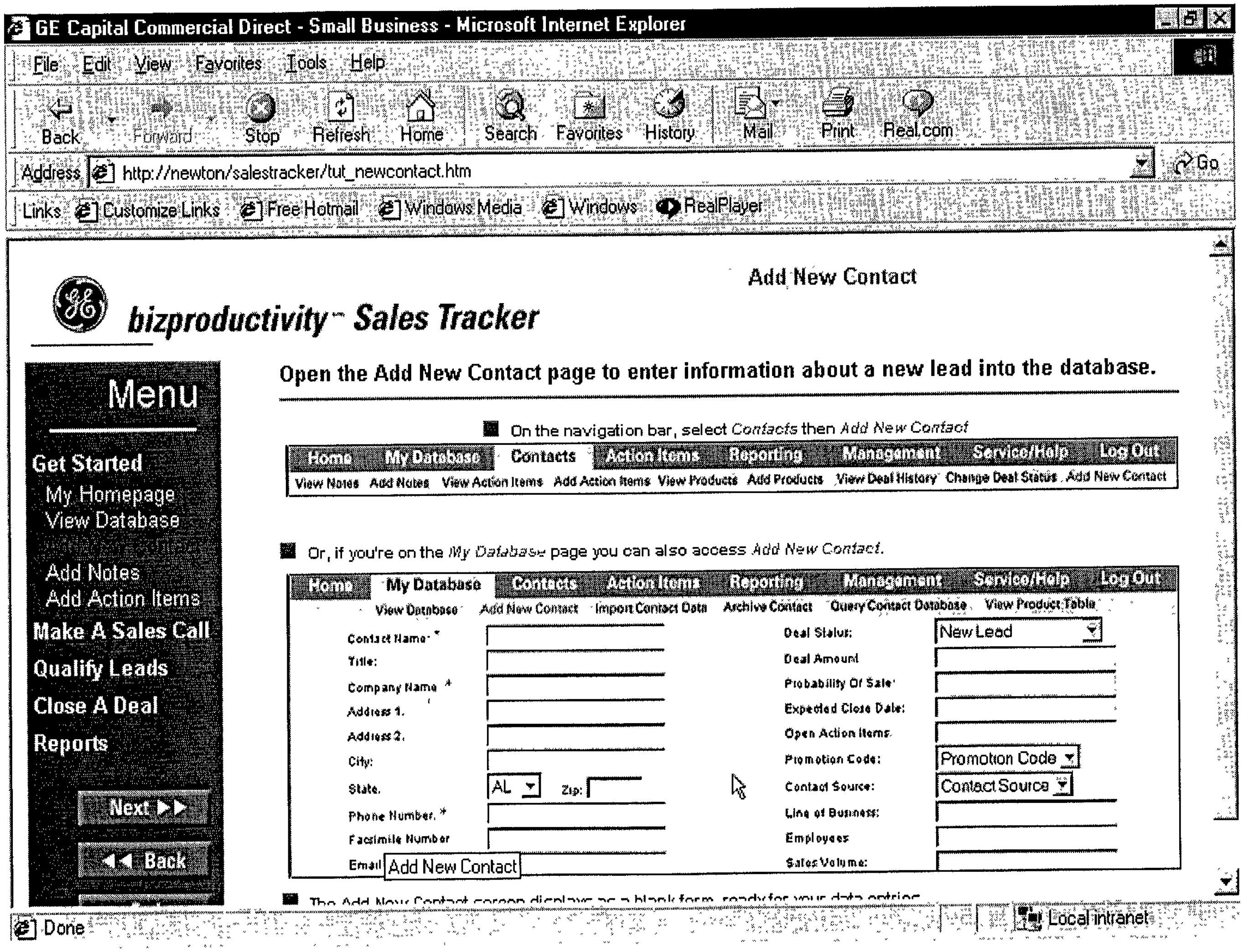
Go Back To HELP Index

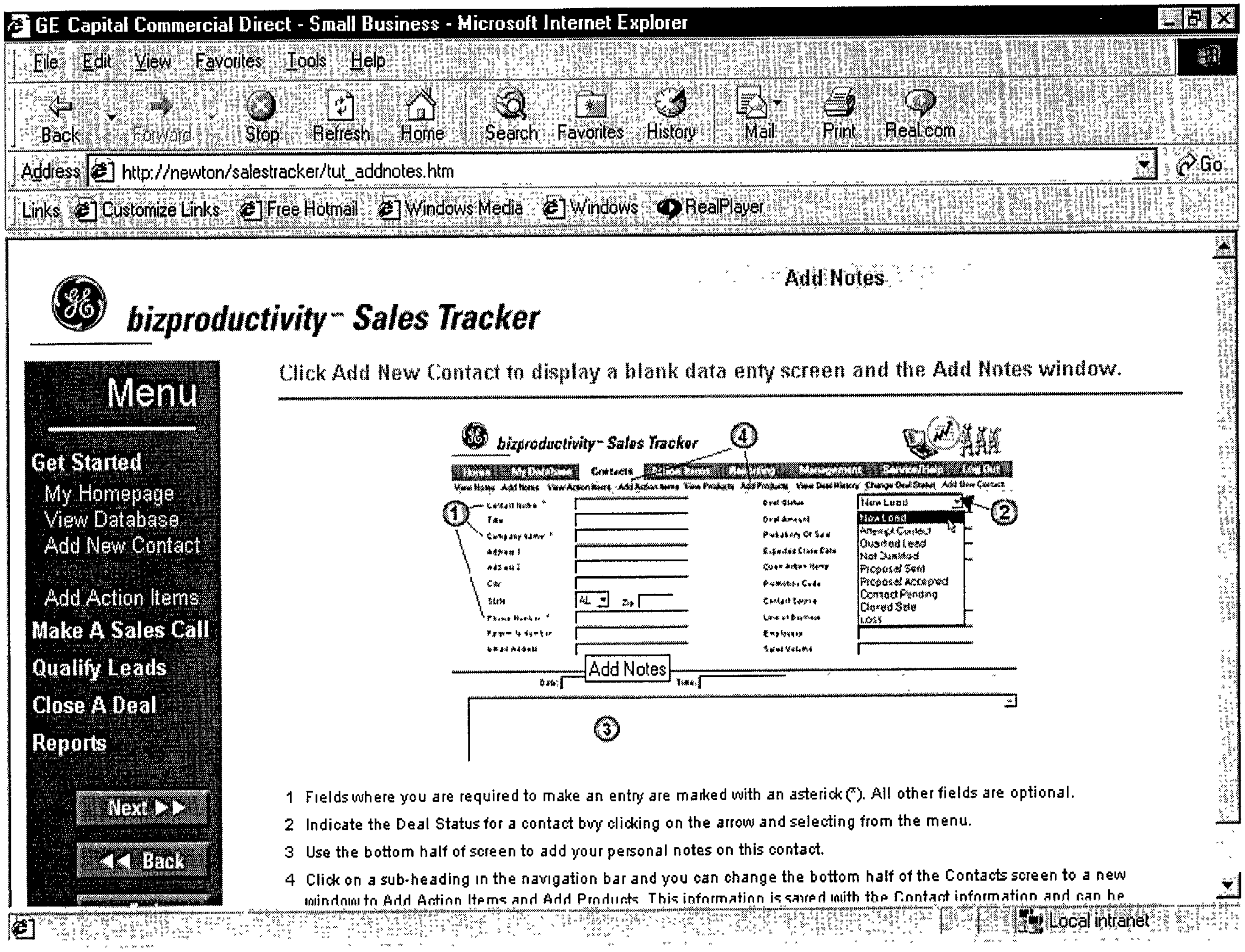
APPENDIX - B

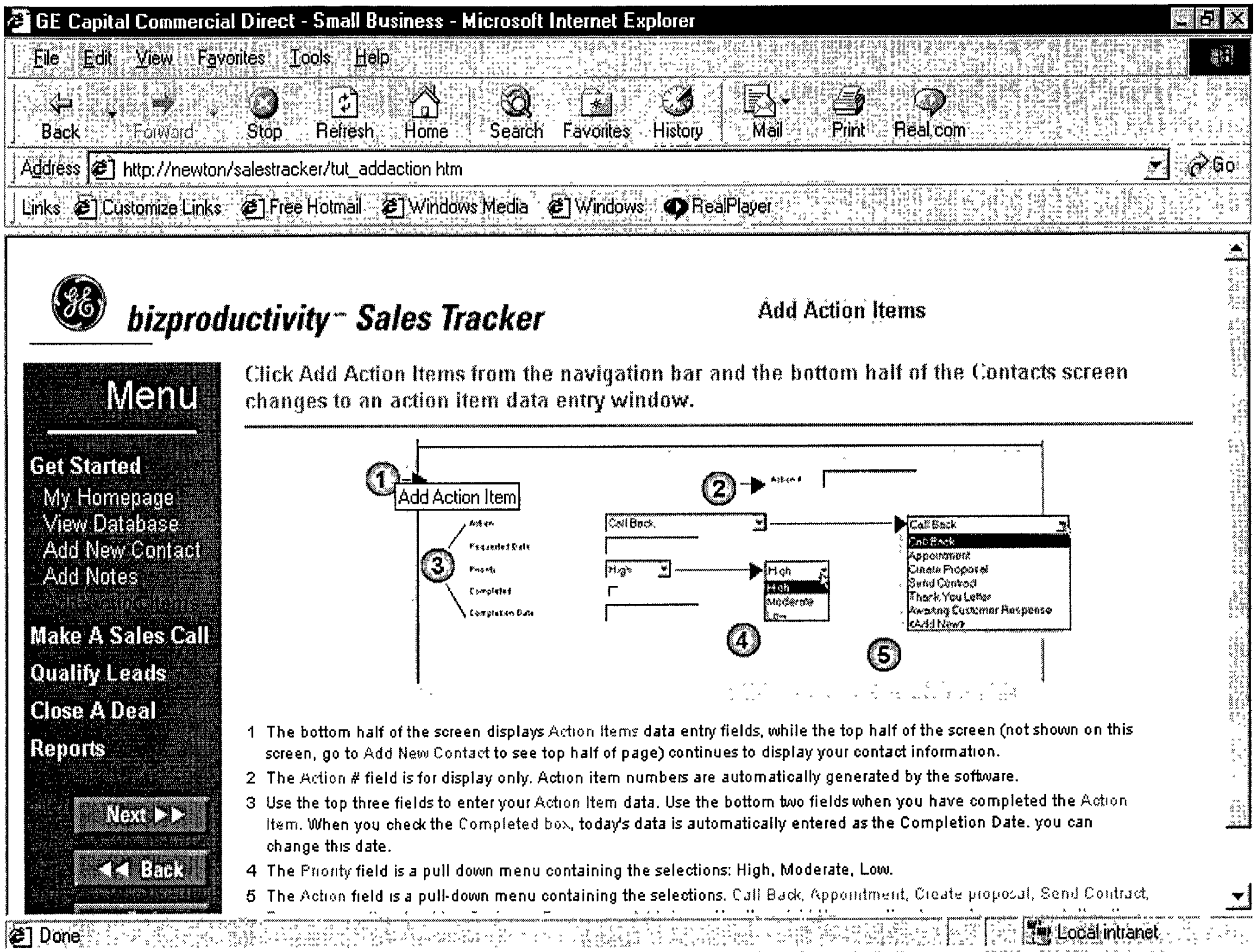

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_start.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity Sales Tracker
Menu
My Homepage
View Database
Add New Contact
Add Notes
Add Action Items
Make A Sales Call
Qualify Leads
Close A Deal
Reports
Next ▶▶
End
Tutorial
Get started on the road to Sales Productivity !
This tutorial shows you just how easy it is to use Sales Tracker to enhance your sales productivity
It will take you 20 to 30 minutes to review the information in this tutorial.
To Move around in this tutorial:
Click the Next button to advance to the next page
Click the Back button to go back to the previous page
Click a topic in the Menu to jump to a particular page
Click the Endbutton when you are finished
Local intranet

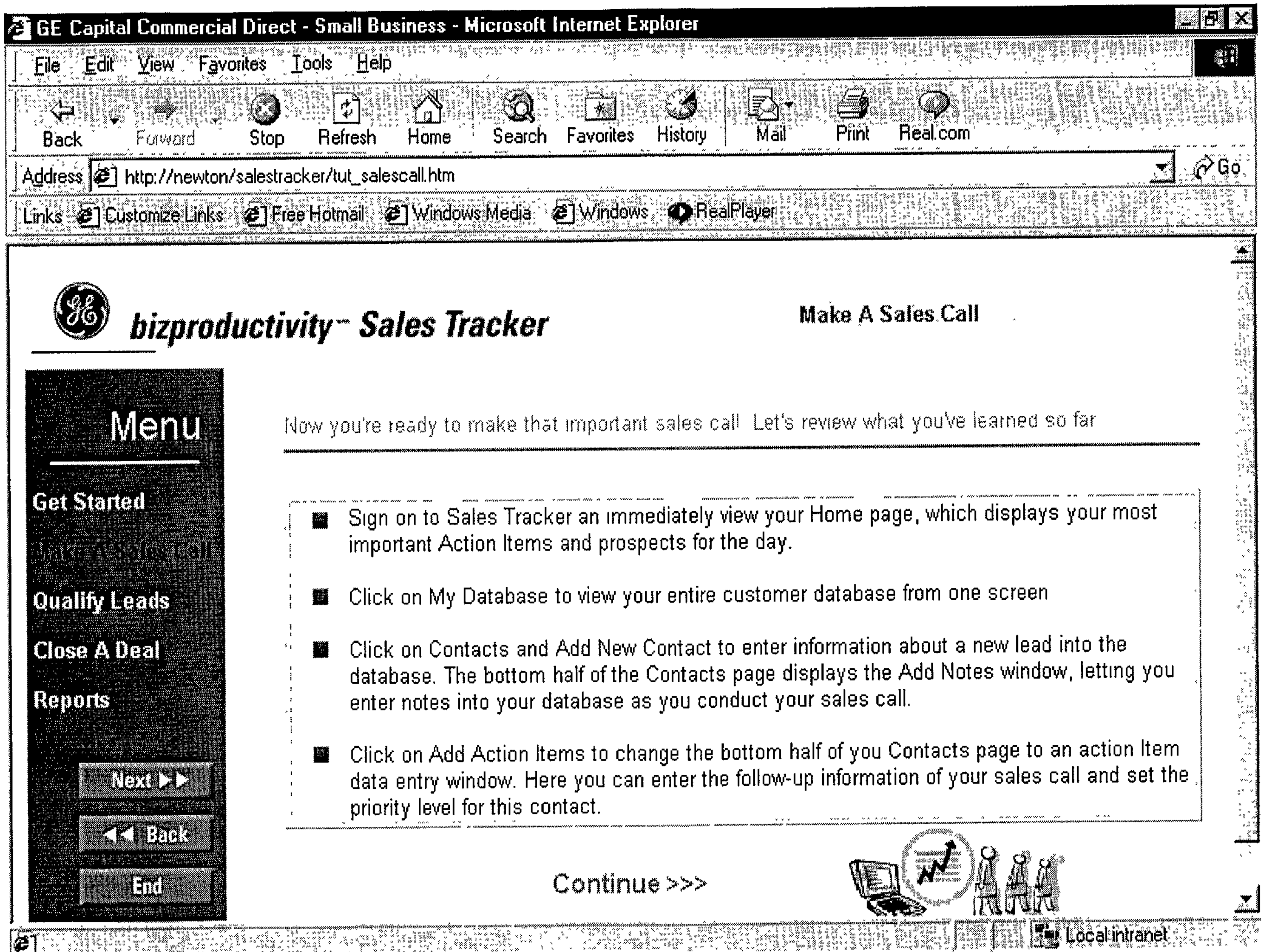

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_home.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
My Homepage
bizproductivity - Sales Tracker
Menu
Get Started
View Database
Add New Contact
Add Notes
Add Action Items
Make A Sales Call
Qualify Leads
Close A Deal
Reports
Next
Back
Sign on to Sales Tracker and the first screen you see is your personal Homepage.
bizproductivity - Sales Tracker
Welcome to Sales Tracker by GE
bizproductivity solution
1
2
3
1 The Navigation Bar is always visable. Move through the screens by clicking on a headin or subheading. The heading test is highlighted in purple to let you know where you are in Sales Tracker.
2 Your Top 5 Action Items are displayed chronologically. These are your personal Action Items that you created. NOTE. If you are a new user nothing will display in this block.
3 Your Top 5 Deals are displayed by highest deal amount. Deals which have been closed or lost do not display. NOTE: If you are a new user nothing will display in this block.
Local intranet

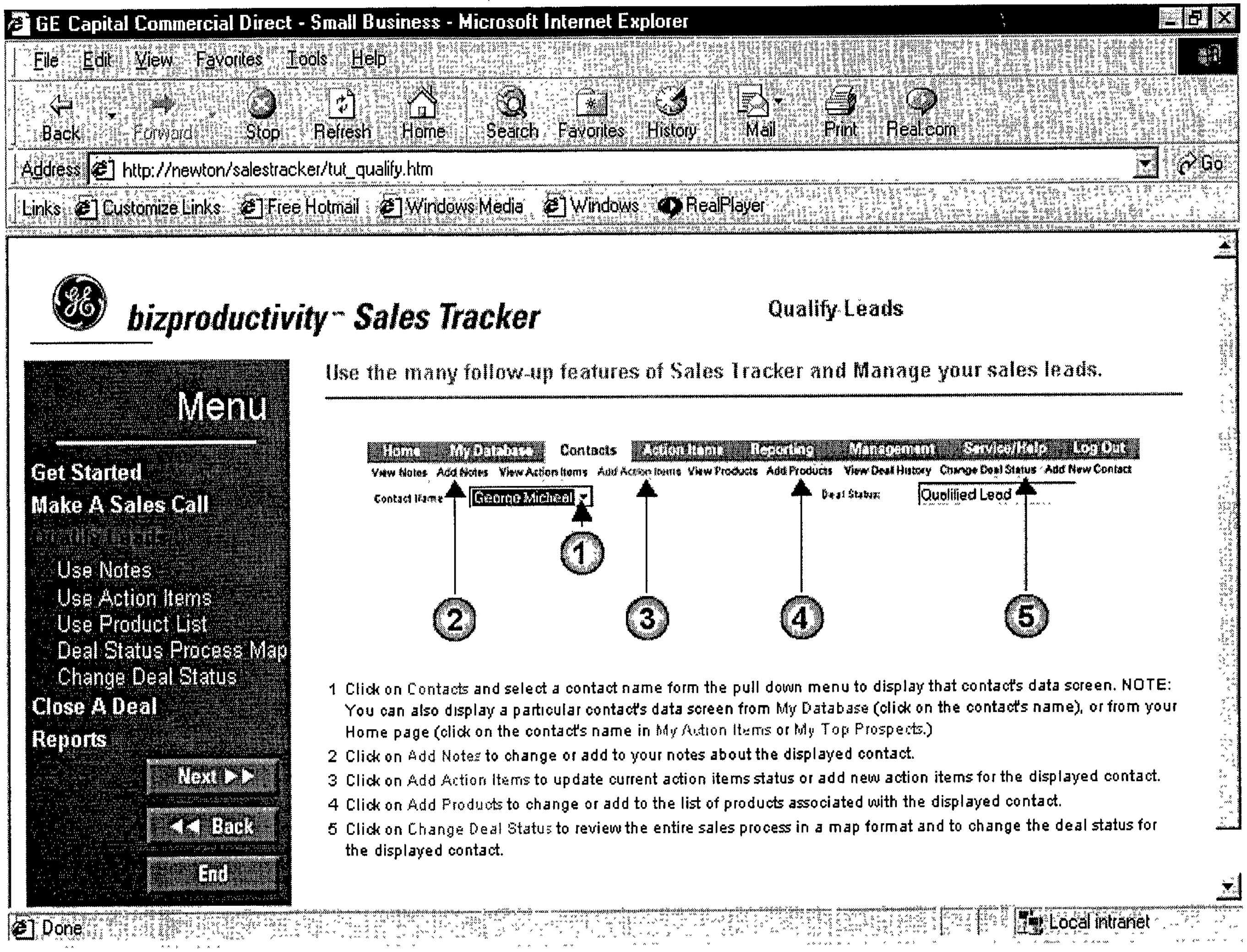

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_viewdatabase.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
View Database
bizproductivity Sales Tracker
Menu
Get Started
My Homepage
Add New Contact
Add Notes
Add Action Items
Make A Sales Call
Qualify Leads
Close A Deal
Reports
Next
Back
Click My Database to view all of your sales data in one convenient screen
1
2
View Database
3
4
5
1 All of your current data is displayed in an easy to read column format.
2 Sort data in any column by clicking on the column heading
3 Click on a Contact Name to view or change the contact data for that business prospect.
4 Change Deal Status by selecitin from thr pulldown menu.
5 The Last Update column shows the date when you last "touched" a contact. No date in the Last Update
Done
Local intranet

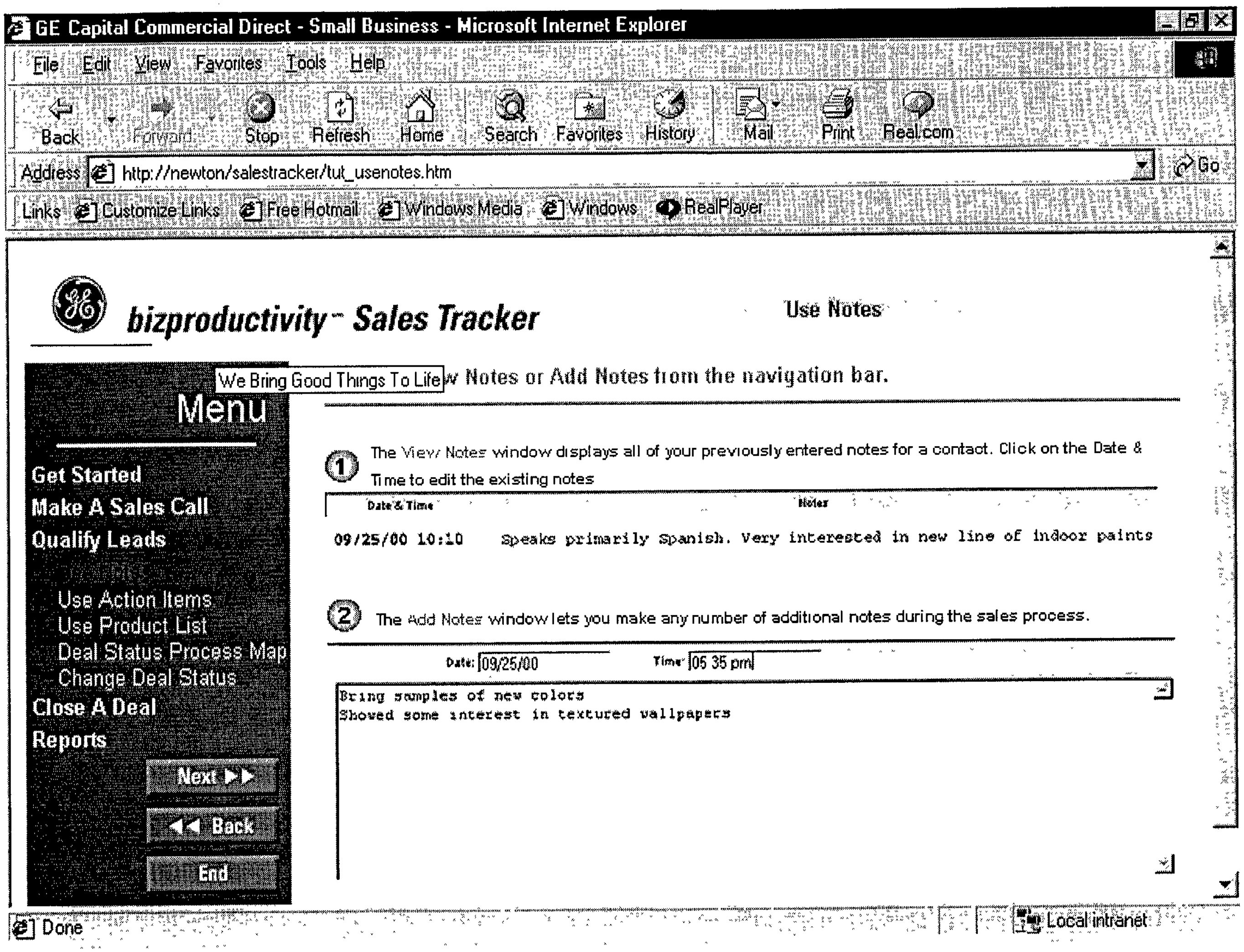

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_newcontact.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
Add New Contact
bizproductivity Sales Tracker
Menu
Get Started
My Homepage
View Database
Add Notes
Add Action Items
Make A Sales Call
Qualify Leads
Close A Deal
Reports
Next
Back
Open the Add New Contact page to enter information about a new lead into the database.
On the navigation bar, select Contacts then Add New Contact
Home My Database Contacts Action Items Reporting Management Service/Help Log Out
View Notes Add Notes View Action Items Add Action Items View Products Add Products View Deal History Change Deal Status Add New Contact
Or, if you're on the My Database page you can also access Add New Contact.
Home My Database Contacts Action Items Reporting Management Service/Help Log Out
View Database Add New Contact Import Contact Data Archive Contact Query Contact Database View Product Table
Contact Name: *
Title:
Company Name *
Address 1.
Address 2.
City:
State. AL Zip:
Phone Number. *
Facsimile Number
Email
Add New Contact
Deal Status: New Lead
Deal Amount
Probability Of Sale
Expected Close Date:
Open Action Items
Promotion Code: Promotion Code
Contact Source: Contact Source
Line of Business:
Employees
Sales Volume:
Done
Local intranet

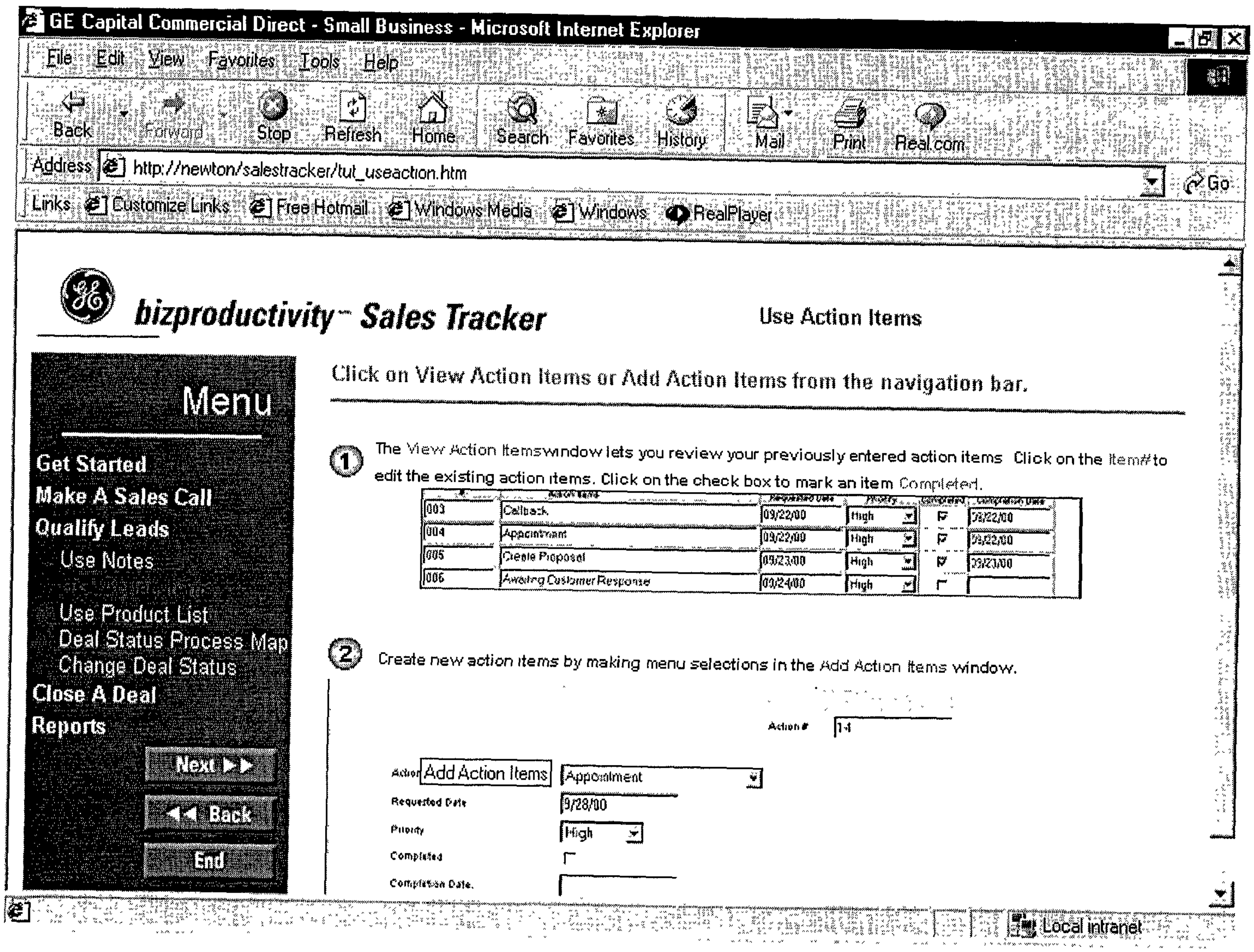

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_addnotes.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
Add Notes
bizproductivity™ Sales Tracker
Menu
Get Started
My Homepage
View Database
Add New Contact
Add Action Items
Make A Sales Call
Qualify Leads
Close A Deal
Reports
Next ▶▶
◀◀ Back
Click Add New Contact to display a blank data enty screen and the Add Notes window.
bizproductivity™ Sales Tracker
Contacts
New Lead
Attempt Contact
Qualified Lead
Not Qualified
Proposal Sent
Proposal Accepted
Contract Pending
Closed Sale
Loss
Add Notes
1 Fields where you are required to make an entry are marked with an asterick (*). All other fields are optional.
2 Indicate the Deal Status for a contact bvy clicking on the arrow and selecting from the menu.
3 Use the bottom half of screen to add your personal notes on this contact.
4 Click on a sub-heading in the navigation bar and you can change the bottom half of the Contacts screen to a new window to Add Action Items and Add Products. This information is saved with the Contact information and can be
Local intranet

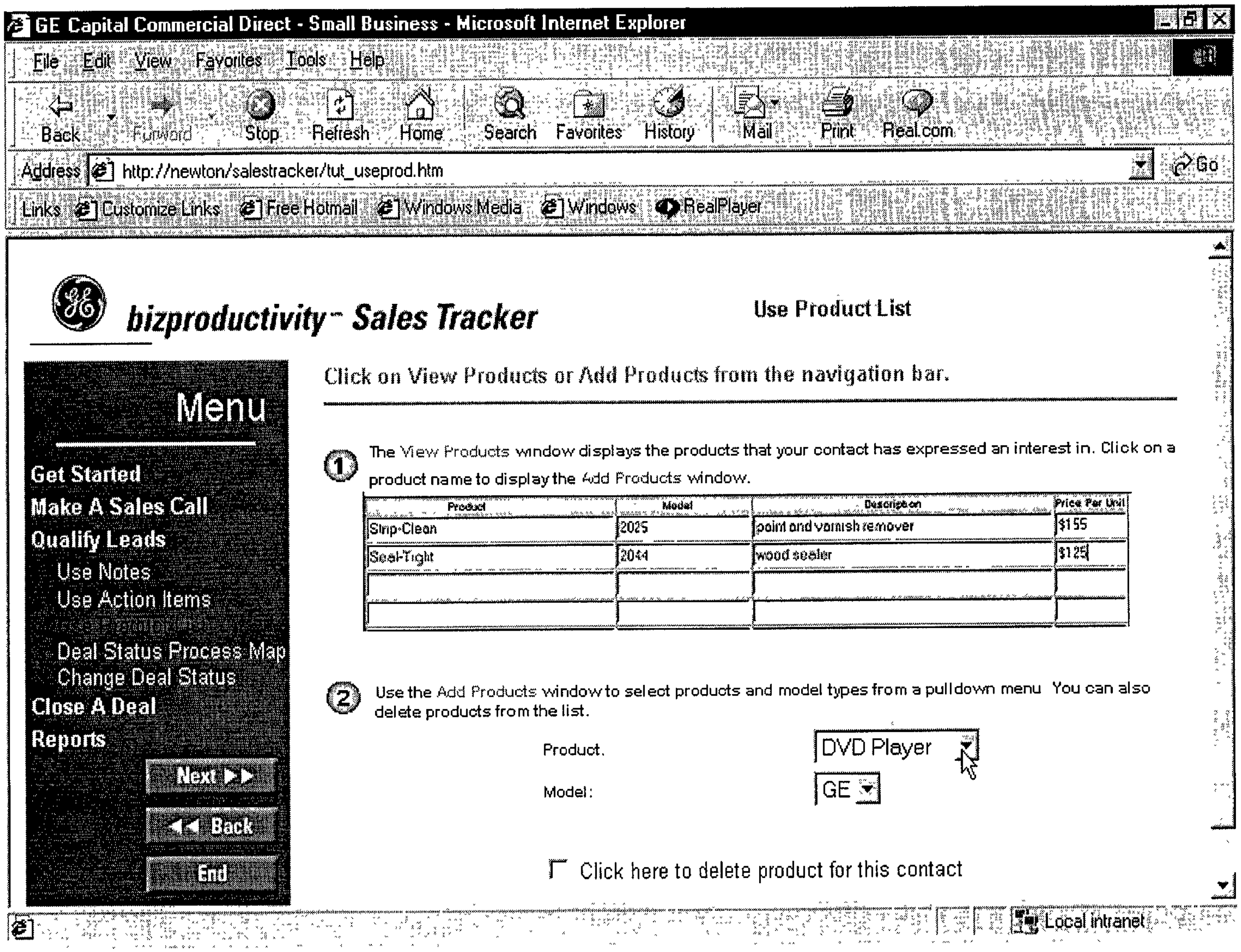

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_addaction htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity Sales Tracker
Add Action Items
Menu
Get Started
My Homepage
View Database
Add New Contact
Add Notes
Make A Sales Call
Qualify Leads
Close A Deal
Reports
Next
Back
Click Add Action Items from the navigation bar and the bottom half of the Contacts screen changes to an action item data entry window.
Add Action Item
Call Back
High
High
Moderate
Call Back
Appointment
Create Proposal
Send Contract
Thank You Letter
Awaiting Customer Response
Add New
1 The bottom half of the screen displays Action Items data entry fields, while the top half of the screen (not shown on this screen, go to Add New Contact to see top half of page) continues to display your contact information.
2 The Action # field is for display only. Action item numbers are automatically generated by the software.
3 Use the top three fields to enter your Action Item data. Use the bottom two fields when you have completed the Action Item. When you check the Completed box, today's data is automatically entered as the Completion Date. you can change this date.
4 The Priority field is a pull down menu containing the selections: High, Moderate, Low.
5 The Action field is a pull-down menu containing the selections. Call Back, Appointment, Create proposal, Send Contract,
Done
Local intranet

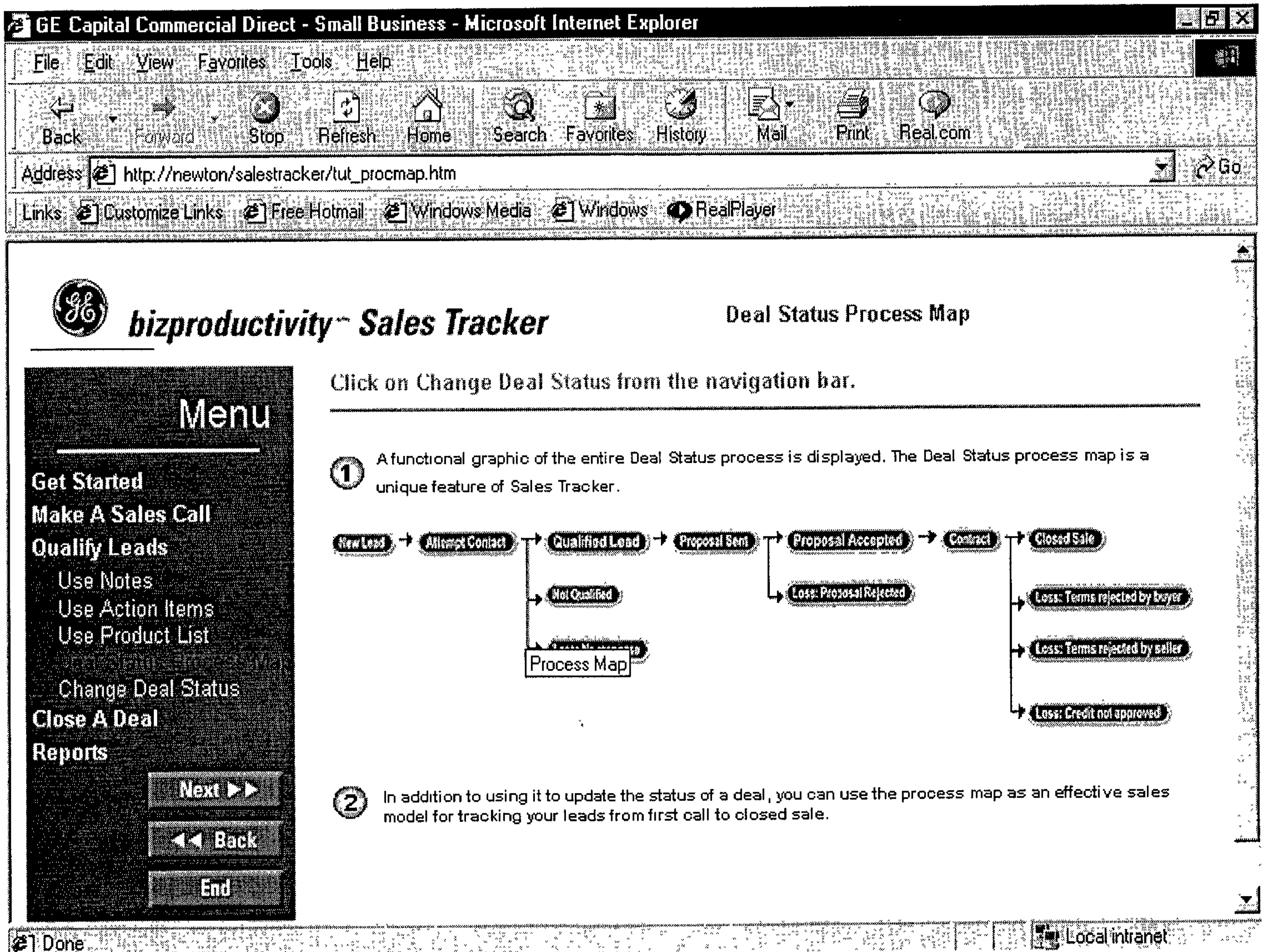

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_salescall.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity™ Sales Tracker
Make A Sales Call
Menu
Get Started
Qualify Leads
Close A Deal
Reports
Next
Back
End
Now you're ready to make that important sales call Let's review what you've learned so far
Sign on to Sales Tracker an immediately view your Home page, which displays your most important Action Items and prospects for the day.
Click on My Database to view your entire customer database from one screen
Click on Contacts and Add New Contact to enter information about a new lead into the database. The bottom half of the Contacts page displays the Add Notes window, letting you enter notes into your database as you conduct your sales call.
Click on Add Action Items to change the bottom half of you Contacts page to an action Item data entry window. Here you can enter the follow-up information of your sales call and set the priority level for this contact.
Continue >>>
Local intranet


GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_qualify.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity Sales Tracker
Qualify Leads
Menu
Get Started
Make A Sales Call
Use Notes
Use Action Items
Use Product List
Deal Status Process Map
Change Deal Status
Close A Deal
Reports
Next
Back
End
Use the many follow-up features of Sales Tracker and Manage your sales leads.
Home My Database Contacts Action Items Reporting Management Service/Help Log Out
View Notes Add Notes View Action Items Add Action Items View Products Add Products View Deal History Change Deal Status Add New Contact
Contact Name
George Micheal
Deal Status:
Qualified Lead
1
2
3
4
5
1 Click on Contacts and select a contact name form the pull down menu to display that contact's data screen. NOTE: You can also display a particular contact's data screen from My Database (click on the contact's name), or from your Home page (click on the contact's name in My Action Items or My Top Prospects.)
2 Click on Add Notes to change or add to your notes about the displayed contact.
3 Click on Add Action Items to update current action items status or add new action items for the displayed contact.
4 Click on Add Products to change or add to the list of products associated with the displayed contact.
5 Click on Change Deal Status to review the entire sales process in a map format and to change the deal status for the displayed contact.
Done
Local intranet

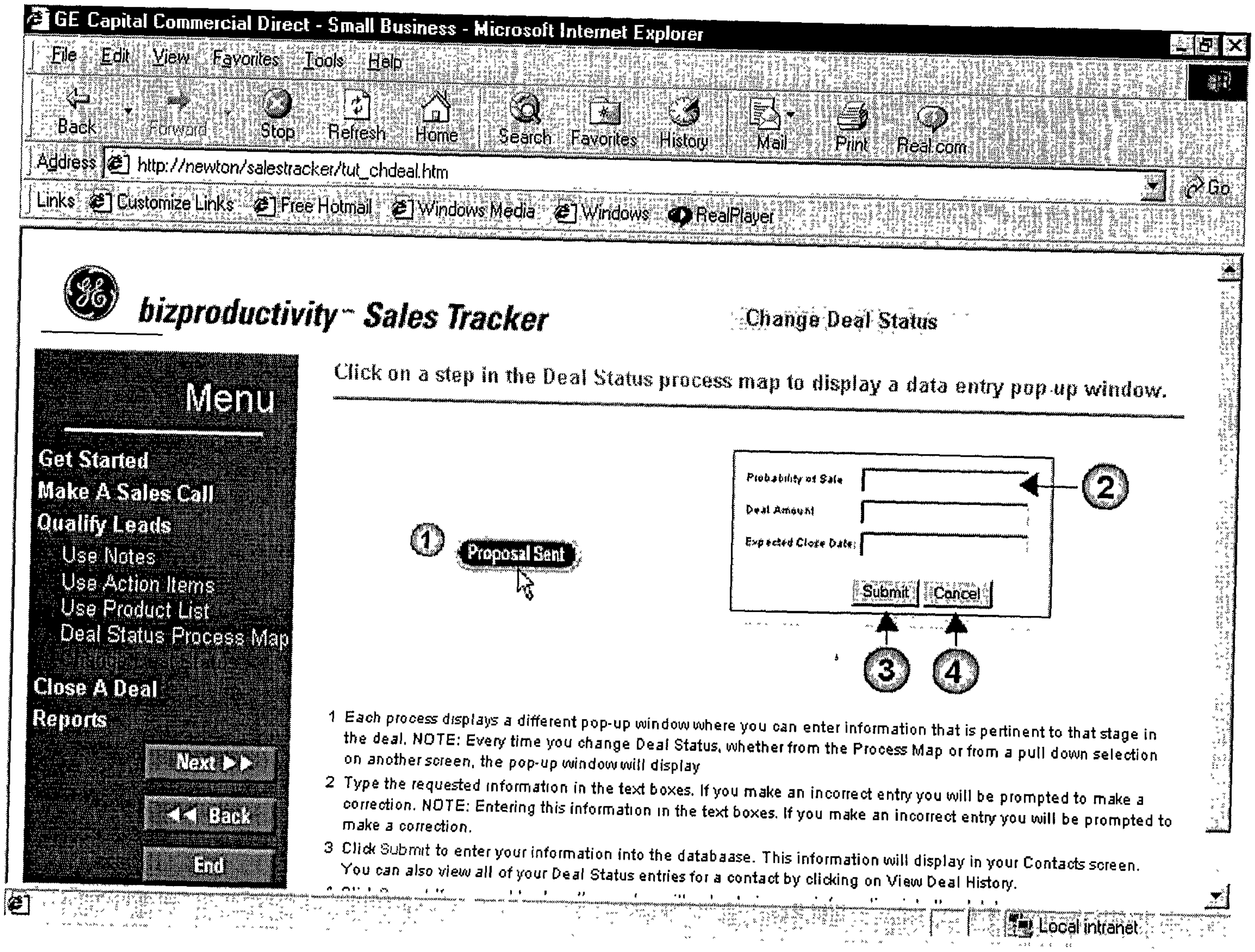

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_usenotes.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity - Sales Tracker
Use Notes
We Bring Good Things To Life
w Notes or Add Notes from the navigation bar.
Menu
Get Started
Make A Sales Call
Qualify Leads
Use Action Items
Use Product List
Deal Status Process Map
Change Deal Status
Close A Deal
Reports
Next
Back
End
1 The View Notes window displays all of your previously entered notes for a contact. Click on the Date & Time to edit the existing notes
Date & Time
Notes
09/25/00 10:10
Speaks primarily Spanish. Very interested in new line of indoor paints
2 The Add Notes window lets you make any number of additional notes during the sales process.
Date: 09/25/00
Time: 05 35 pm
Bring samples of new colors
Showed some interest in textured wallpapers
Done
Local intranet

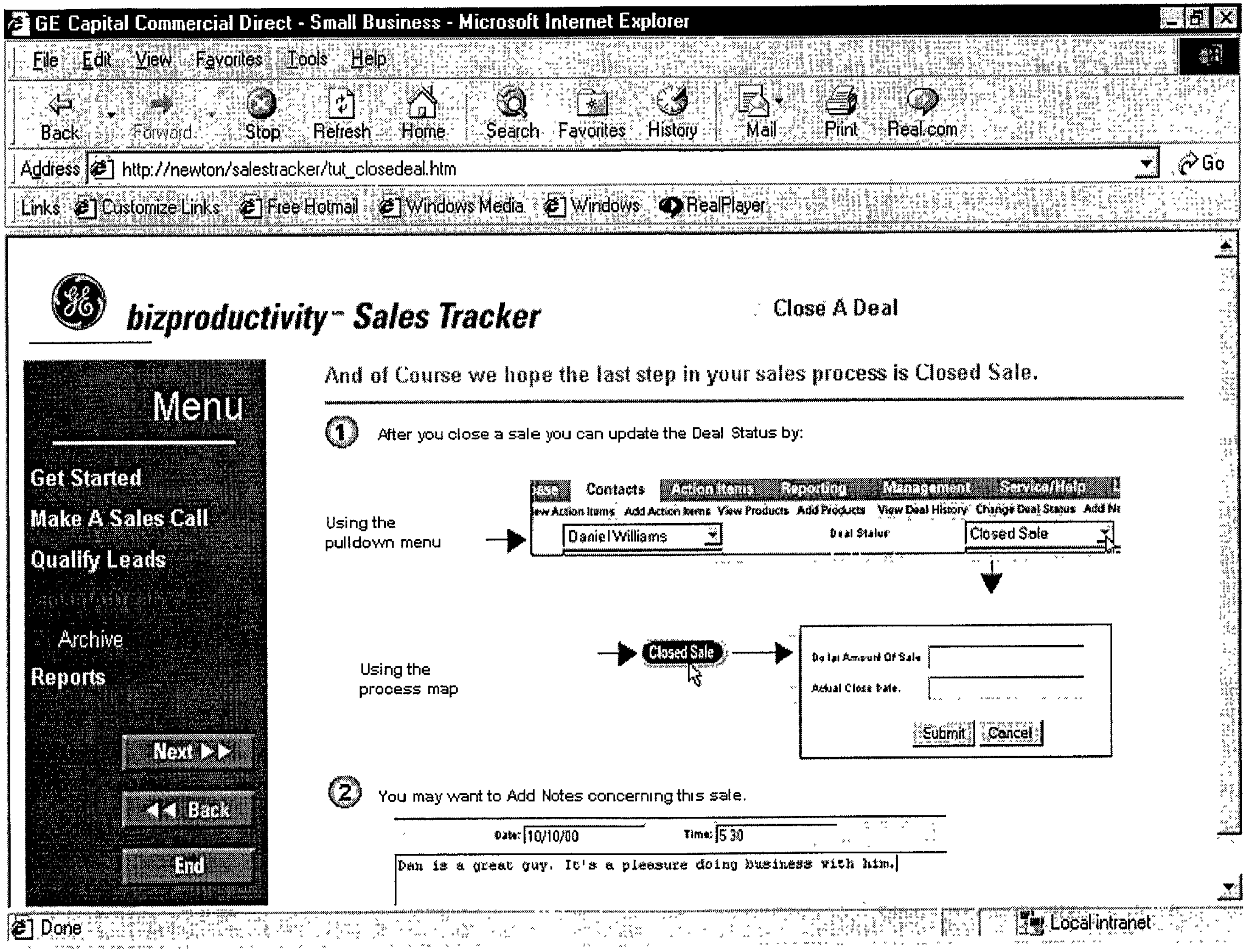

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_useaction.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity Sales Tracker
Use Action Items
Menu
Get Started
Make A Sales Call
Qualify Leads
Use Notes
Use Product List
Deal Status Process Map
Change Deal Status
Close A Deal
Reports
Next
Back
End
Click on View Action Items or Add Action Items from the navigation bar.
1 The View Action Itemswindow lets you review your previously entered action items Click on the Item# to edit the existing action items. Click on the check box to mark an item Completed.
003 Callback 09/22/00 High 09/22/00
004 Appointment 09/22/00 High 09/22/00
005 Create Proposal 09/23/00 High 09/23/00
006 Awaiting Customer Response 09/24/00 High
2 Create new action items by making menu selections in the Add Action Items window.
Action # 14
Add Action Items
Appointment
Requested Date 9/28/00
Priority High
Completed
Completion Date.
Local intranet

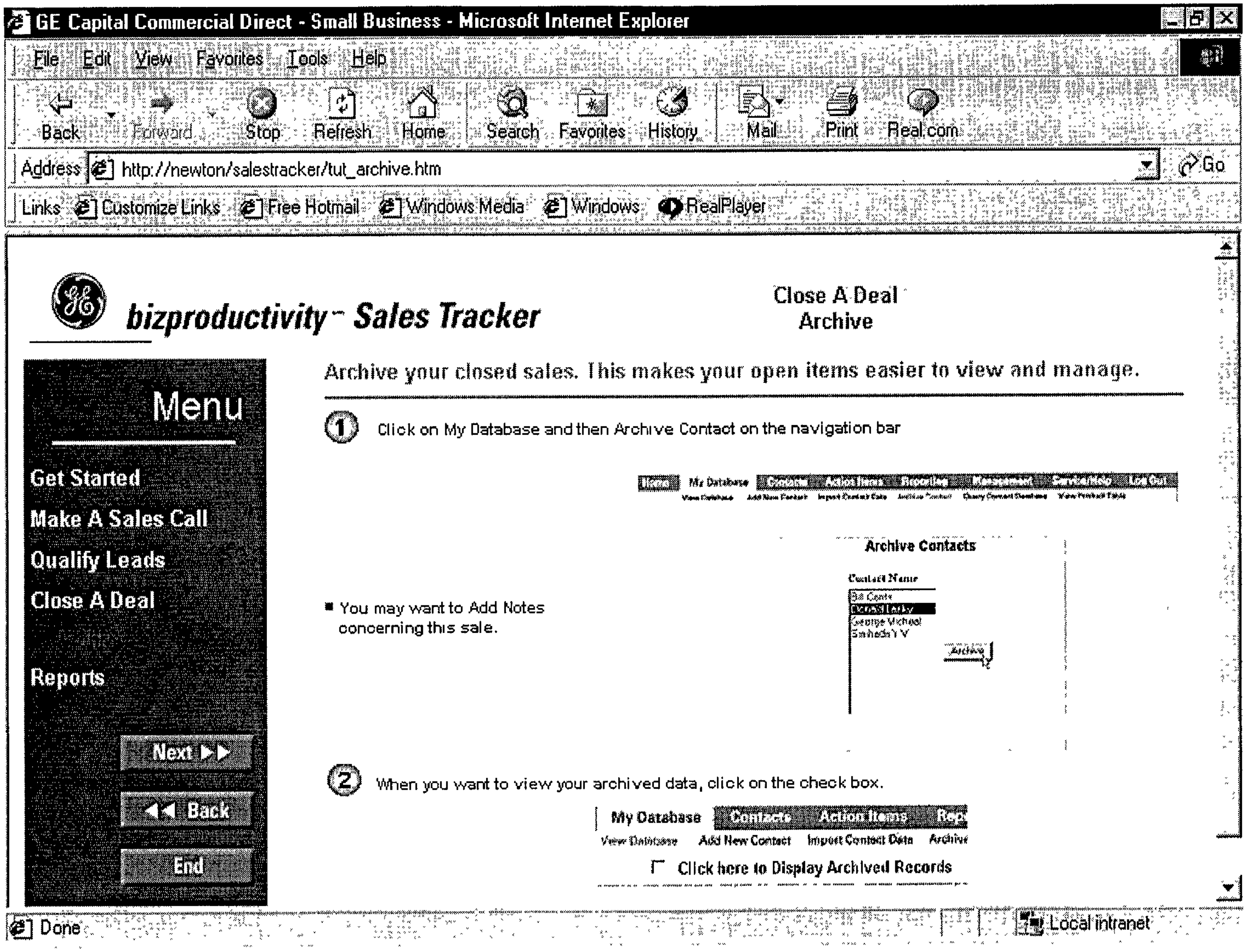

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_useprod.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity Sales Tracker
Use Product List
Menu
Get Started
Make A Sales Call
Qualify Leads
Use Notes
Use Action Items
Deal Status Process Map
Change Deal Status
Close A Deal
Reports
Next
Back
End
Click on View Products or Add Products from the navigation bar.
1 The View Products window displays the products that your contact has expressed an interest in. Click on a product name to display the Add Products window.
Product
Model
Description
Price Per Unit
Strip-Clean
2025
paint and varnish remover
$155
Seal-Tight
2044
wood sealer
$125
2 Use the Add Products window to select products and model types from a pulldown menu You can also delete products from the list.
Product.
DVD Player
Model:
GE
Click here to delete product for this contact
Local intranet

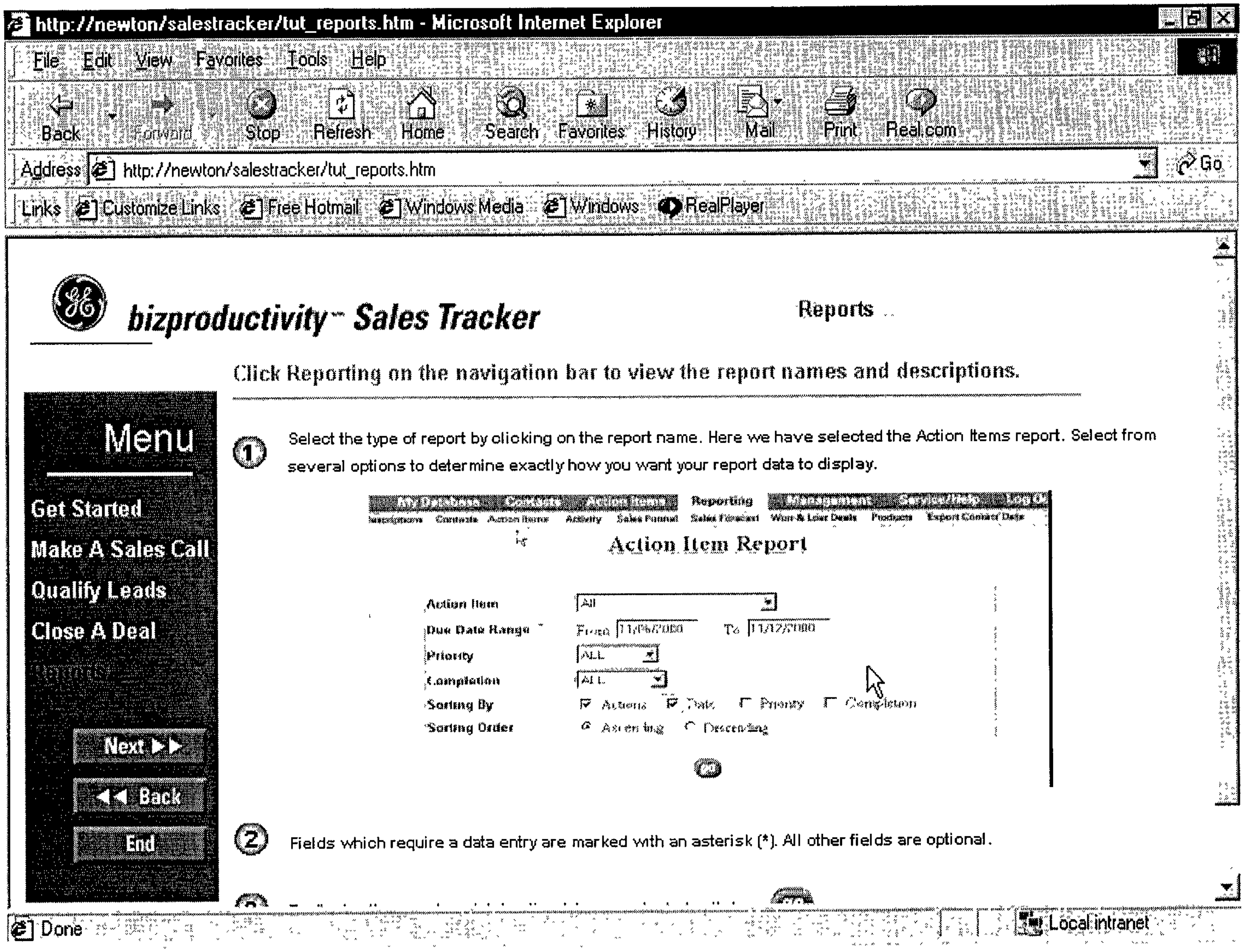


GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_procmap.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity Sales Tracker
Deal Status Process Map
Menu
Get Started
Make A Sales Call
Qualify Leads
Use Notes
Use Action Items
Use Product List
Change Deal Status
Close A Deal
Reports
Next
Back
End
Click on Change Deal Status from the navigation bar.
1 A functional graphic of the entire Deal Status process is displayed. The Deal Status process map is a unique feature of Sales Tracker.
New Lead
Attempt Contact
Qualified Lead
Proposal Sent
Proposal Accepted
Contract
Closed Sale
Not Qualified
Loss: Proposal Rejected
Loss: Terms rejected by buyer
Loss: Terms rejected by seller
Loss: Credit not approved
Process Map
2 In addition to using it to update the status of a deal, you can use the process map as an effective sales model for tracking your leads from first call to closed sale.
Done
Local intranet

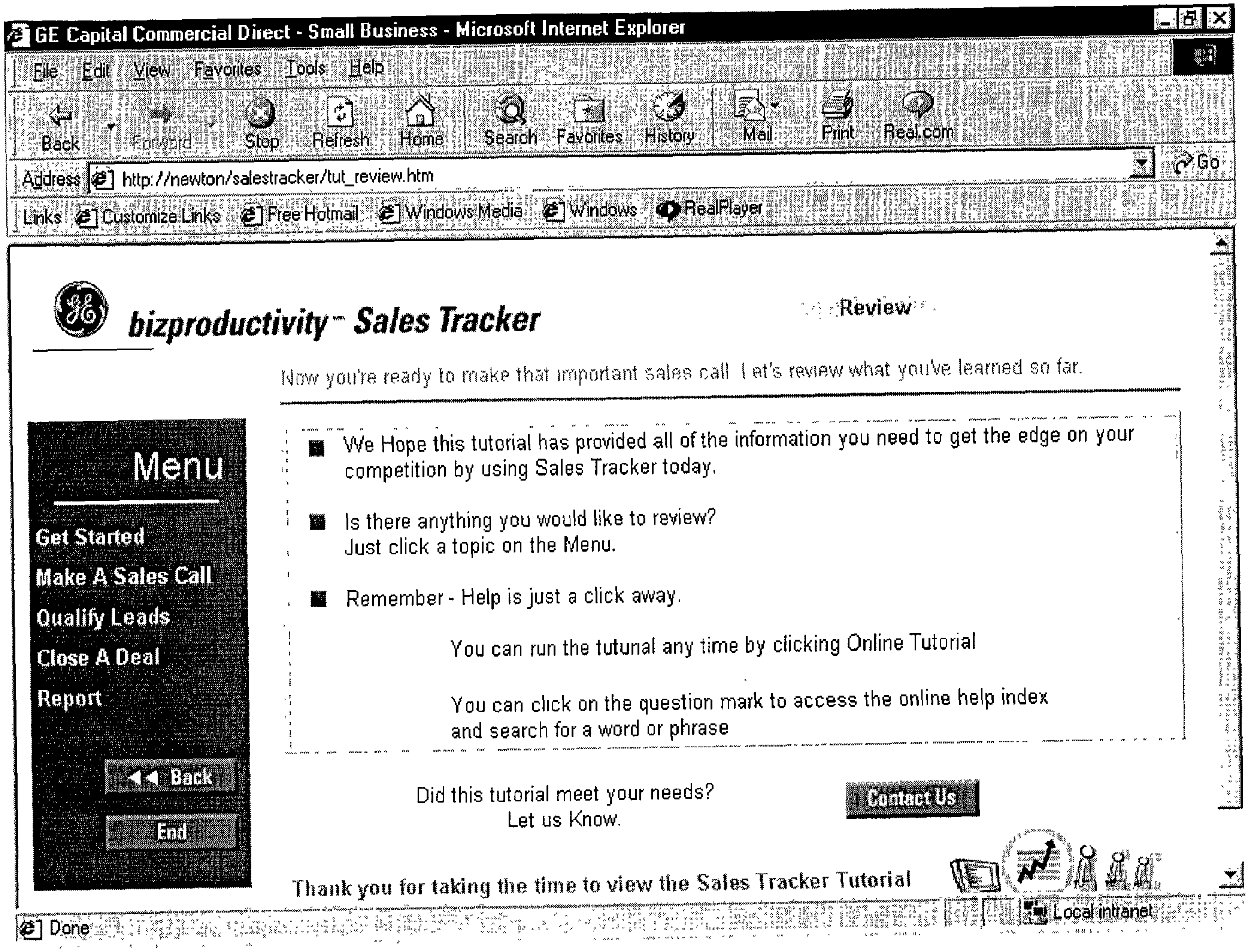

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_chdeal.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity™ Sales Tracker
Change Deal Status
Menu
Get Started
Make A Sales Call
Qualify Leads
Use Notes
Use Action Items
Use Product List
Deal Status Process Map
Close A Deal
Reports
Next ►►
◄◄ Back
End
Click on a step in the Deal Status process map to display a data entry pop-up window.
1
Proposal Sent
Probability of Sale
Deal Amount
Expected Close Date:
Submit
Cancel
2
3
4
1 Each process displays a different pop-up window where you can enter information that is pertinent to that stage in the deal. NOTE: Every time you change Deal Status, whether from the Process Map or from a pull down selection on another screen, the pop-up window will display
2 Type the requested information in the text boxes. If you make an incorrect entry you will be prompted to make a correction. NOTE: Entering this information in the text boxes. If you make an incorrect entry you will be prompted to make a correction.
3 Click Submit to enter your information into the databaase. This information will display in your Contacts screen. You can also view all of your Deal Status entries for a contact by clicking on View Deal History.
Local intranet

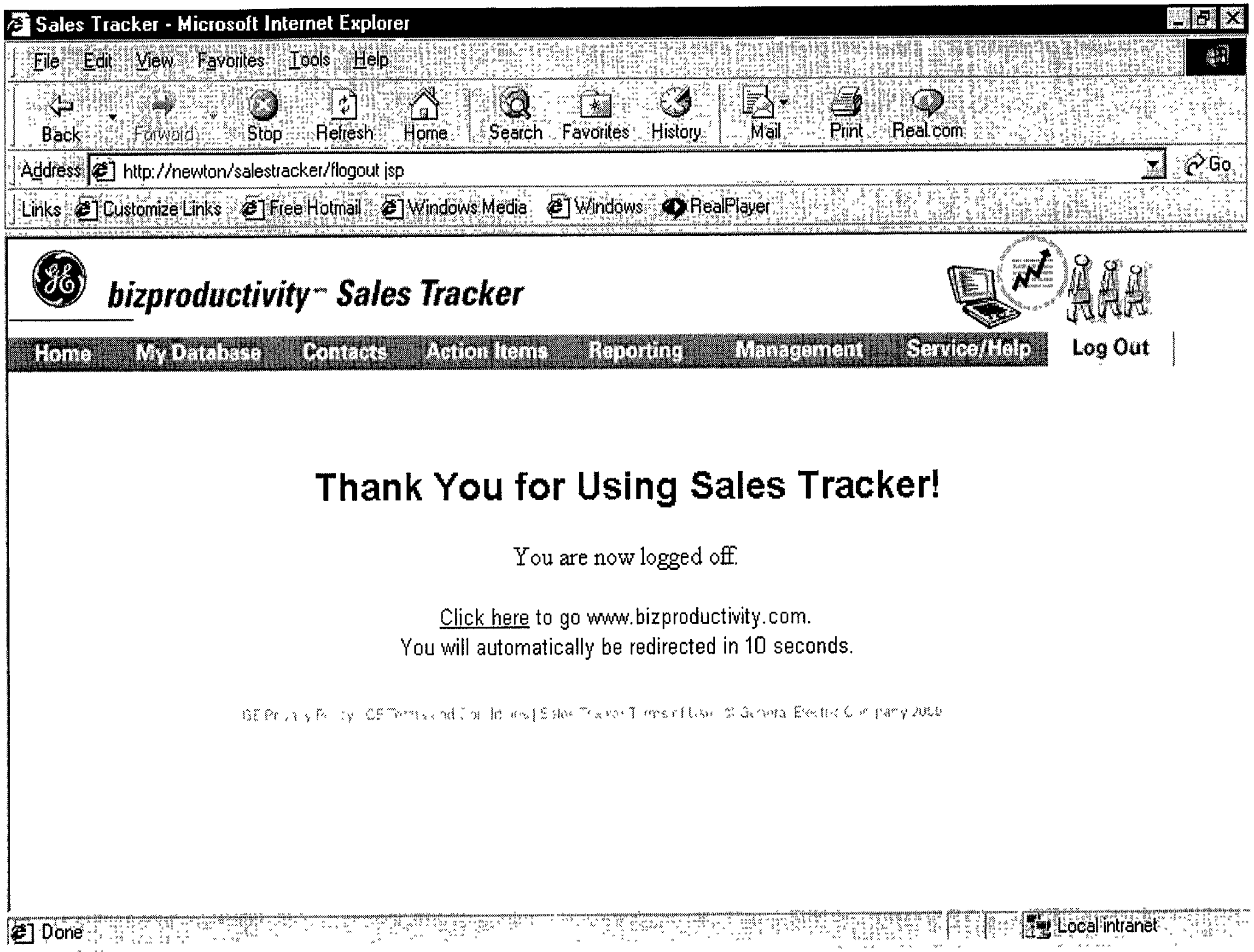

GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_closedeal.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity Sales Tracker
Close A Deal
Menu
Get Started
Make A Sales Call
Qualify Leads
Archive
Reports
Next
Back
End
And of Course we hope the last step in your sales process is Closed Sale.
1 After you close a sale you can update the Deal Status by:
Using the pulldown menu
Contacts
Action Items
Reporting
Management
Service/Help
Daniel Williams
Deal Status
Closed Sale
Using the process map
Closed Sale
Submit
Cancel
2 You may want to Add Notes concerning this sale.
Date: 10/10/00
Time: 5 30
Dan is a great guy. It's a pleasure doing business with him.
Done
Local intranet


GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_archive.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity - Sales Tracker
Close A Deal
Archive
Menu
Get Started
Make A Sales Call
Qualify Leads
Close A Deal
Reports
Next
Back
End
Archive your closed sales. This makes your open items easier to view and manage.
1 Click on My Database and then Archive Contact on the navigation bar
My Database
Archive Contacts
Contact Name
You may want to Add Notes concerning this sale.
2 When you want to view your archived data, click on the check box.
My Database Contacts Action Items
View Database Add New Contact Import Contact Data Archive
Click here to Display Archived Records
Done
Local intranet



http://newton/salestracker/tut_reports.htm - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_reports.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity Sales Tracker
Reports
Click Reporting on the navigation bar to view the report names and descriptions.
Menu
Get Started
Make A Sales Call
Qualify Leads
Close A Deal
Next
Back
End
1 Select the type of report by clicking on the report name. Here we have selected the Action Items report. Select from several options to determine exactly how you want your report data to display.
Reporting
Action Item Report
Action Item
All
Due Date Range *
From 11/06/2000
To 11/12/2000
Priority
ALL
Completion
ALL
Sorting By
Actions
Date
Priority
Completion
Sorting Order
Ascending
Descending
2 Fields which require a data entry are marked with an asterisk (*). All other fields are optional.
Done
Local intranet


GE Capital Commercial Direct - Small Business - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/tut_review.htm
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity - Sales Tracker
Review
Now you're ready to make that important sales call. Let's review what you've learned so far.
Menu
Get Started
Make A Sales Call
Qualify Leads
Close A Deal
Report
Back
End
We Hope this tutorial has provided all of the information you need to get the edge on your competition by using Sales Tracker today.
Is there anything you would like to review? Just click a topic on the Menu.
Remember - Help is just a click away.
You can run the tuturial any time by clicking Online Tutorial
You can click on the question mark to access the online help index and search for a word or phrase
Did this tutorial meet your needs? Let us Know.
Contact Us
Thank you for taking the time to view the Sales Tracker Tutorial
Done
Local intranet


Sales Tracker - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Real.com
Address http://newton/salestracker/logout.jsp
Go
Links Customize Links Free Hotmail Windows Media Windows RealPlayer
bizproductivity™ Sales Tracker
Home My Database Contacts Action Items Reporting Management Service/Help Log Out
Thank You for Using Sales Tracker!
You are now logged off.
Click here to go www.bizproductivity.com.
You will automatically be redirected in 10 seconds.
Done
Local intranet